



February 8, 2023

## Market Updates:

## Emerging Markets

Indices	Close	% Chg.
BSE SENSEX	60286.04	-0.37%
S&P CNX Nifty	17721.50	-0.24%
Shanghai	3247.94	0.00%
Bovespa (Brazil)	107829.70	-0.82%
RTS (Russia)	1004.37	-0.28%
Merval Index	246804.20	1.31%

## Asian Markets

Nikkei 225	27543.39	-0.51%
Hang Seng	21351.98	0.25%
Strait Times	3390.36	0.28%

## U. S. Markets

Dow Jones	34156.69	0.78%
Nasdaq	12113.79	1.90%
S&P 500	4164.00	1.29%

## European Markets

CAC 40	7132.35	-0.07%
DAX	15320.88	-0.16%
FTSE	7864.71	0.36%

## Indian Indices

Indices	Close	% Chg.
SENSEX Index	60286.04	-0.37%
NIFTY Index	17721.50	-0.24%
spbsmip Index	24637.58	0.02%
spbssip Index	27956.74	-0.16%
BSE100 Index	17968.24	-0.24%
BSE200 Index	7554.84	-0.23%
BSE500 Index	23710.99	-0.23%
CNX100 Index	17569.70	-0.24%
CNXMCAP Index	30663.80	-0.02%
CNX500 Index	14902.20	-0.21%
BSEAUTO Index	30246.44	-0.92%
BANKEX Index	46942.03	0.29%
BSETCD Index	38314.37	-0.75%
BSETCG Index	34325.43	0.49%
spbscgip Index	16477.25	-1.13%
spbshlip Index	22210.24	-0.01%
spbsitip Index	30116.86	-0.40%
BSEMETL Index	20159.95	-1.89%
BSEOIL Index	17601.80	-0.26%
BSEPOWR Index	3562.47	-0.67%
BSETPSU Index	9523.64	0.04%
BSEREA Index	3291.95	0.77%
BSETECK Index	13892.78	-0.45%
CNXBANK Index	41490.95	0.28%
CNXIT Index	30310.70	-0.33%

## Institutional Investors Net Position

06/02/23	Cash	F&O	Total
MFs	NA	NA	NA
FIs	-1038.5	-695.4	-1733.9
Total	-1038.5	-695.4	-1733.9

Source – SEBI

## FII &amp; DII Activity on BSE &amp; NSE (Cr.)

07/02/23	Buy	Sell	Net
DII Cash	6010	5370	640
FII Cash *	7126	9686	-2560
FII F&O	1350932	1340624	10308
Total	1364068	1355680	8388

\* Provisional Figures, Source – NSE

## US Markets

US stocks rallied to a convincingly higher close on Tuesday, but trade was choppy as investors digested comments from Federal Reserve Chair Jerome Powell about how long the central bank might need to tame inflation. The Dow Jones Industrial Average rose 265.67 points, or 0.78 percent, to 34,156.69, the S&P 500 gained 52.92 points, or 1.29 percent, to 4,164 and the Nasdaq Composite added 226.34 points, or 1.9 percent, to 12,113.79.

## European Markets

European markets nudged fractionally higher Tuesday as investors awaited comments from central bank officials including Fed Chairman Jerome Powell. The pan-European Stoxx 600 was choppy through the session and provisionally closed up 0.15%. Oil and gas stocks climbed 2.8% as household goods shed 0.9%. The U.K.'s FTSE 100 was the only major index in the green, up 0.35% as banks and mining stocks gained. Germany's DAX and France's CAC 40 both fell around 0.1%. U.S. stocks were lower in early trade as investors braced themselves for the latest commentary due from Federal Reserve Chairman Jerome Powell.

## Asian Markets

Asia-Pacific markets traded mixed on Wednesday, as Federal Reserve Chairman Jerome Powell overnight acknowledged that inflation is declining — a sign the central bank may soon pause its rate hikes. The Nikkei 225 fell 0.34 percent, while the Topix gained 0.12 percent. The Kospi in South Korea rose 0.68 percent.

## SGX Nifty

Trends in the SGX Nifty indicate a positive opening for the broader index in India with a gain of 73 points. The Nifty futures were trading around 17,803 levels on the Singaporean exchange.

## Market Outstanding OI in F&amp;O Segment

F&O Open Interest	Value (Cr.)	% Chg.
Index Futures	64.0	0.9
Index Options	6614.8	6.7
Stock Futures	-398.6	-0.6
Stock Options	-335.2	-4.1
<b>Total</b>	<b>5945.0</b>	<b>3.2</b>

Money Market	Close	Yield (%)
Call Money Rate	-	<b>6.00</b>
6.45%'29 Govt. Sec.	<b>100.20</b>	<b>7.25</b>

Exchange Rates	Current	% Change
US Dollar	82.70	<b>0.29</b>
British Pound	99.67	<b>0.18</b>
Euro	88.82	<b>-0.21</b>
Japanese Yen	62.57	<b>-0.02</b>

Bullion / Crude	Close	% Chg.
Gold	1875.13	0.41%
Silver	22.38	0.49%
Brent Crude*	81.79	0.99%
WTI Crude *	74.91	1.08%

ADR Prices (\$)	Close	% Chg.
HDFC Bank	67.19	0.42
ICICI Bank	20.72	0.39
Infosys Tech.	19.03	1.12
Dr. Reddys	54.22	2.38
Wipro	4.86	0.00

## Market Breadth (NSE)

Advances	946
Declines	1293
Same	81
<b>Total</b>	<b>2320</b>
A/D Ratio	<b>0.73 : 1</b>

## Industry/Company News

**Vodafone Idea:** The company allocated 16.13 crore shares, or 33.44% stake, to the government in lieu of conversion of interest dues from deferment of adjusted gross revenue and spectrum auction payments.

**ONGC:** The company interacted with global oil majors, including ExxonMobil, Equinor, Baker Hughes, and France-based Institut Français du Pétrole, to collaborate in its exploration ventures in deepwaters of India at the India Energy Week.

**BSE:** The stock exchange will divest 2.5% stake in Central Depository Services Ltd. to meet regulatory shareholding norms.

**Canara Bank:** The bank appointed K Satyanarayana Raju as MD & CEO, with effect from Feb. 7, 2023, till his superannuation on Dec. 31, 2025. The board also appointed Hardeep Singh Ahluwalia as executive director, for three years.

**PC Jeweller:** Four more banks—IDBI Bank, Indian Bank, Bank of India and Karur Vysya Bank—have issued loan recall notices against the company.

**Blue Star:** The company detected a cyberattack at certain locations, following which, its technical team had taken all necessary precautions to retrieve and restore the systems. The company said it has not found any material impact on the operations due to this incident.

**Rail Vikas Nigam:** The company emerged as the lowest bidder for provision of automatic block signalling on Madar-Sakhun section of Jaipur division over North-Western Railway. The project cost is Rs 69.48 crore.

Institutional Activity (Rs. in Crores)							
Date	FIIs			Mutual Funds			Total Net
	Purchase	Sales	Net	Purchase	Sales	Net	
6-Feb-22	7048.25	8086.74	-1038.49	NA	NA	NA	-1038.49
3-Feb-22	10021.85	10271.76	-249.91	NA	NA	NA	-249.91
2-Feb-22	9035.22	12672.91	-3637.69	NA	NA	NA	-3637.69
1-Feb-22	14804.64	12262.01	2542.63	NA	NA	NA	2542.63
31-Jan-22	15171.56	19829.43	-4657.87	NA	NA	NA	-4657.87
Total of Current Week	68772.10	81506.28	-12734.18	NA	NA	NA	-12734.18
Total of Last Week	32575.28	38858.09	-6282.81	16115.49	16300.22	-184.73	-6098.08
Total for Current Month	40909.96	43293.42	-2383.46	NA	NA	NA	-2383.46
Total for Last month	162479.53	192429.37	-29949.84	80130.64	70332.39	9798.25	-39748.09
Year Upto Date	203389.49	235722.79	-32333.30	80130.64	70332.39	9798.25	-42131.55

FII Daily Trends in Derivative (Rs. in Crores)											
Details	Buy		Sell		NET	Current Open Interest		Previous Open Interest		NET	
	No. Of	Value	No. Of	Value		No. Of	Value	No. Of	Value	Value	% Change
	Contracts		Contracts			Contracts		Contracts			
Index Future	77563	7564	76851	7474	89	81265	7513	80484	7449	64	0.9
Index Options	14959068	1319234	14839610	1307838	11396	1131067	105714	1072743	99099	6615	6.7
Stock Futures	167134	10876	172907	11116	-240	1082804	71808	1089175	72206	-399	-0.6
Stock Options	191534	13258	213945	14196	-938	123890	7767	133182	8102	-335	-4.1
Total	15395299	1350932	15303313	1340624	10308	2419026	192802	2375583	186857	5945	3.2

Market Turnover (Rs. Crores)			
	07/02/23	06/02/23	% Chg.
BSE	3721	3078	20.91
NSE	54510	48012	13.53
NSE F&O	21411319	12054657	77.62
Total	21469551	12105747	77.35

Volumes (Lacs Shares)			
	07/02/23	06/02/23	% Chg.
BSE	46.50	58.87	-21.01
NSE	23070	27140	-15.00
Total	23117	27199	-15.01

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